BEACON HR/PAYROLL IMPLEMENTATION PROJECT
ACCESS INSTRUCTIONS
FOR
MICROSOFT ENTERPRISE PROJECT MANAGEMENT
SOLUTION
USING
LOADSPRING HOSTING ENVIRONMENT

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Last Update: 1/11/2007 8:39 AM   i   Last printed 1/11/2007 8:39 AM
FINAL

TABLE OF CONTENTS

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   ii   Last printed 1/11/2007 8:39 AM

FINAL

1. INTRODUCTION

The purpose of this document is to provide users the required information to connect to the Beacon HR/Payroll Implementation Project Microsoft Enterprise Project Management (EPM) Solution hosted by LoadSpring, LLC. This document is designed for all members of the HR/Payroll team regardless of the project-specific role they may hold (Team Leader, Executive, Team Member). However, depending on the specific role of the user, the applications they have access to may vary.

2. LOADSPRING OVERVIEW

LoadSpring, LLC specializes in the hosting of project management solutions for geographically dispersed project teams. By using a Citrix-based presentation layer for applications presented through secure socket layer (SSL) web pages, users can access all aspects of their project management solution remotely, without the need to rely on VPN or other heightened security requirements. For the Beacon HR/Payroll Implementation Project, this will allow both contractor and State employee resources to connect to the EPM solution from any location, at any time of day. They will access the EPM solution through the LoadSpring web application called CAM Console. All users will utilize the LoadSpring CAM Console to access the Beacon HR/Payroll Implementation Project EPM solution in order to help the PMO administer licenses and provide user assistance.

2.1.   Beacon HR/Payroll Implementation Project EPM Solution Server Information

- Computer Name: LSPR01-0523-20

- IP Address: 155.212.11.144

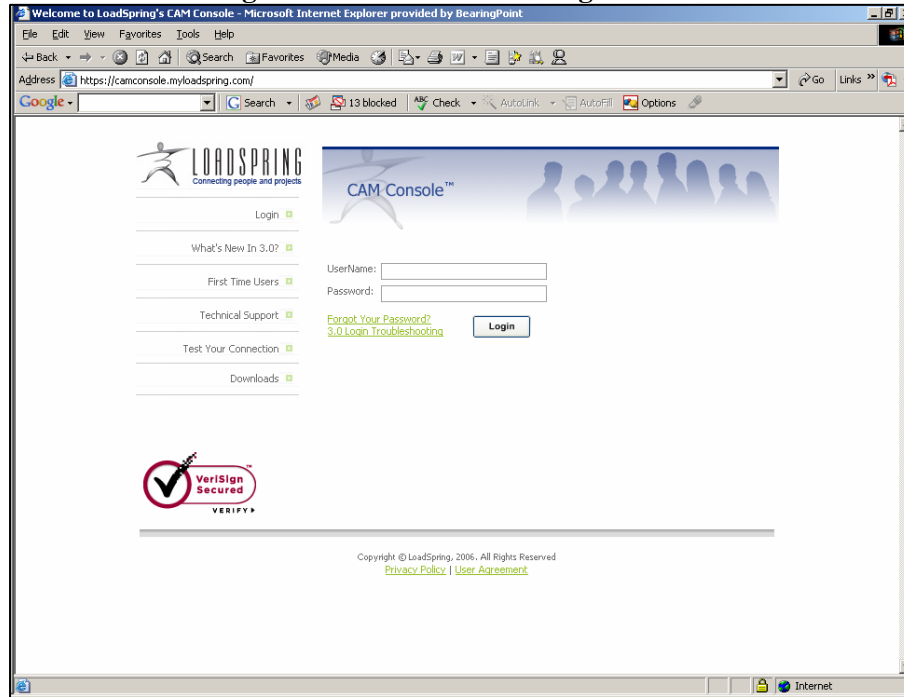- LoadSpring CamConsole Portal Access URL: http://camconsole.myloadspring.com

3. LOADSPRING CAM CONSOLE

3.1.   Login Procedures

A profile has been created for all users that will provide them with access to the applications they require.

- Open Internet Explorer and enter the following URL: http://camconsole.myloadspring.com

- A login and password screen will appear. Users should enter their login name in the firstinitial_lastname format (i.e.: jjernovics)

   o   Individual passwords will be distributed for security reasons.

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Last Update: 1/11/2007 8:39 AM   1   Last printed 1/11/2007 8:39 AM
FINAL

Figure 2.1: CAM Console Login Screen

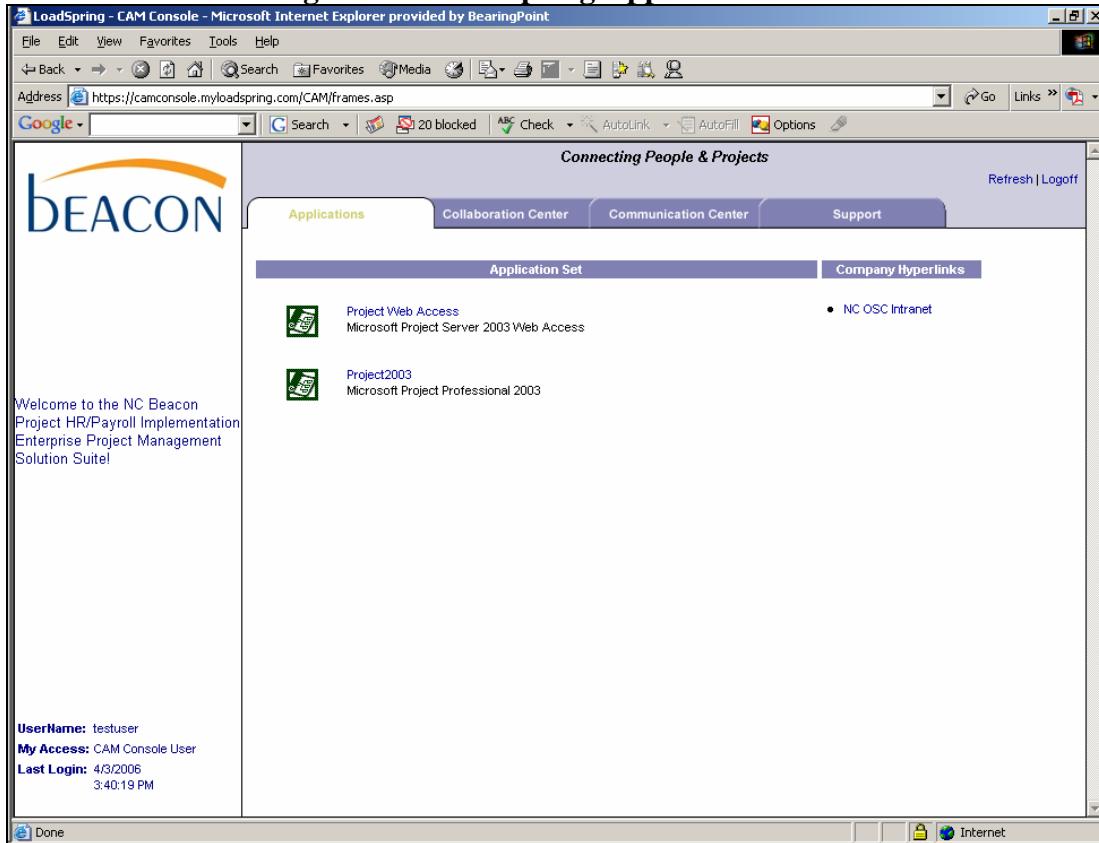- Click the *Login* button to continue.

  NOTE: There is a link for users that have forgotten their password. This capability is enabled through the use of a secret question/answer combination, therefore it is essential users establish their secret question and answer upon initial login.

3.2.   Application Access

Upon login, the user will be directed to a webpage that will contain links to the EPM applications the have access to. The majority of team members on the HR/Payroll project will only have access to the Project Web Access (PWA) application.   This application provides access to summary information for all project components of the Beacon HR/Payroll Implementation Project Integrated Master Schedule (IMS) and access to the document management, risks, and issues collaboration features. The PMO and section Team Leaders will have access to both PWA and the Microsoft Project client application.

 NOTE: If you do not have access to an application that you feel you require, please contact the PMO.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   2   Last printed 1/11/2007 8:39 AM
FINAL

Figure 2.2: LoadSpring Applications Tab

- Most users will see four tabs on the initial page: **Applications, Collaboration Center, Communications Center,** and **Support**

- Clicking on the application icon on the Application Tab will launch the application via a remote access client (Citrix ICA). The application will appear to be running from the user's machine, but it will actually be running on the LoadSpring Citrix server(s).
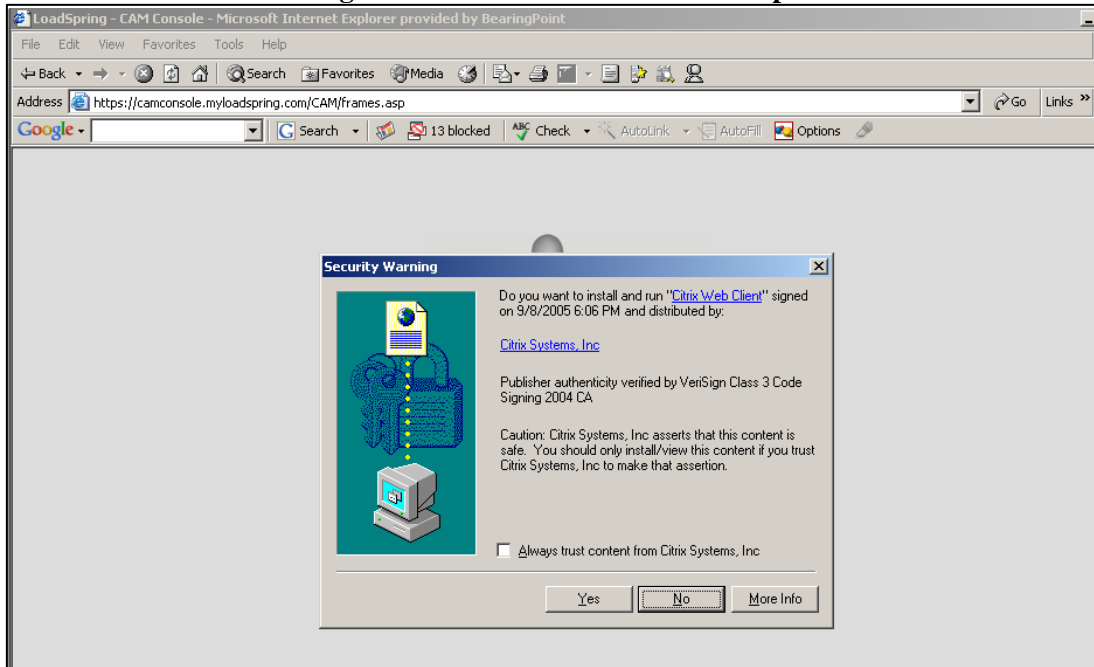
NOTE: Initial connection to the programs via the Citrix ICA client will require some minimal configuration. Please see the next section for configuration instructions.

3.3.   Citrix ICA Configuration

The very first time a user utilizes the CamConsole to launch an application, they will be prompted to download and configure the Citrix ICA client.
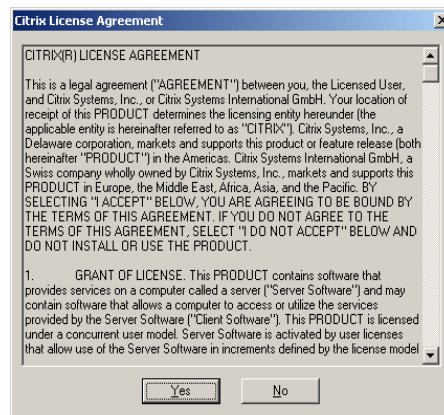
When prompted, click "Yes" to install the Citrix ICA client.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   3   Last printed 1/11/2007 8:39 AM
FINAL

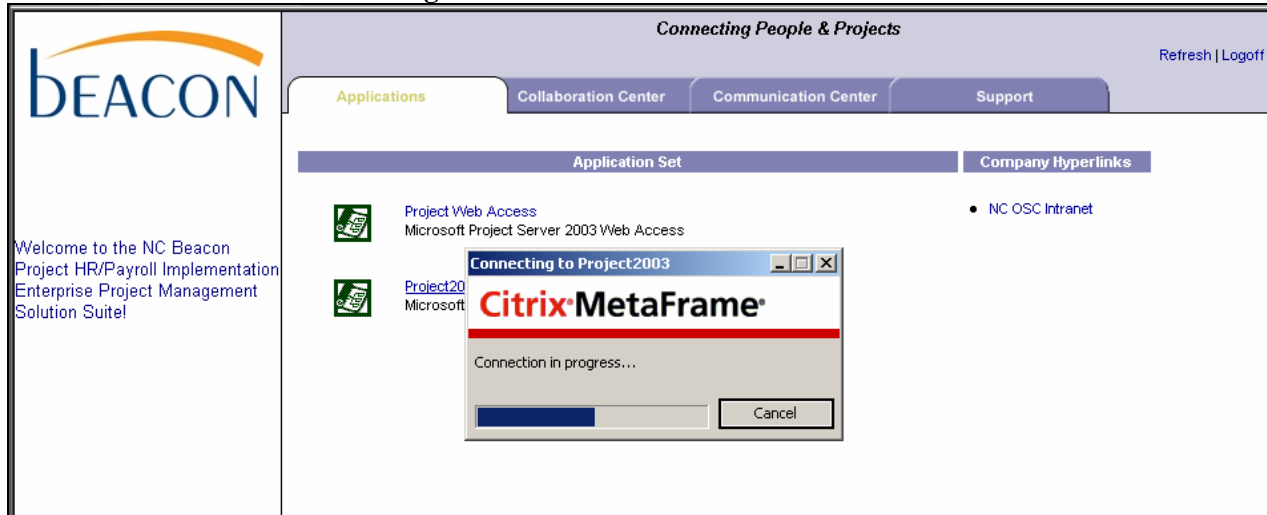**Figure 2.3a: Citrix ICA Install Prompt**

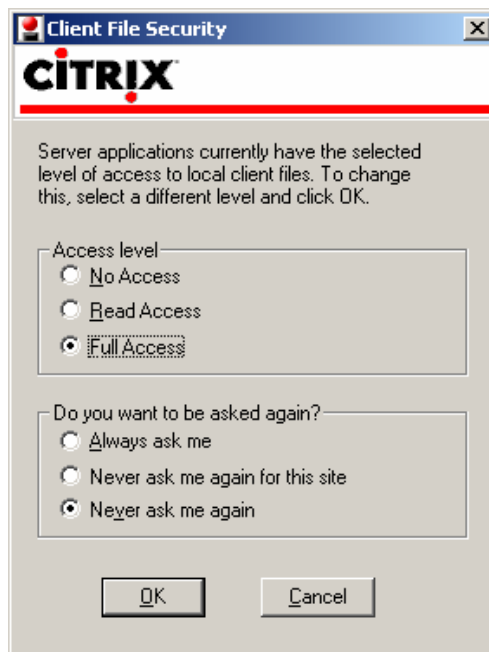Accept the License Agreement:

Figure 2.3b: Citrix License Agreement

The Citrix ICA client launch window will then appear. This will serve as notification to the user that the application is about to launch.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   4   Last printed 1/11/2007 8:39 AM
FINAL

Figure 2.3c: Citrix MetaFrame launch

The user will be prompted how they want their computer to interface with the Citrix application. In most cases, if the user is going to be uploading documents (files, project plans, etc) between their computer and the LoadSpring server, they should select "*Full Access*". If they do not wish to keep answering this query every *time they launch an application through Citrix, they can choose the "Never* ask me again" option.

Figure 2.3d: Citrix Client File Security Dialog Box

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   5   Last printed 1/11/2007 8:39 AM
FINAL

3.3.1. Additional Login

Upon the initial login of a session (logging in to LoadSpring environment), users may be required to re-authenticate prior to launching a chosen application. The authentication screen will differ depending on the Operating System being utilized.
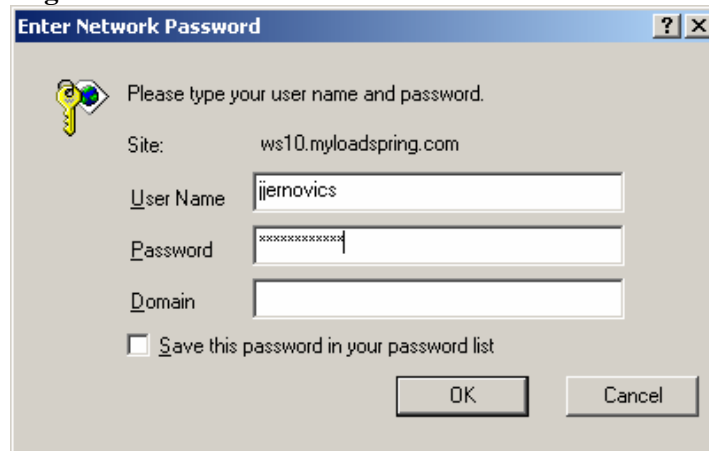
3.3.1.1. Windows XP

Windows XP users will only need to enter their login and password information as described in section 2.1.

3.3.1.2. Windows 2000

Windows 2000 users will be prompted for a user name, password and domain. They should enter their login and password as described in section 2.1 and leave the domain field blank.

Figure 2.3.1.2: Windows 2000 Re-authentication Screen

3.4.   CamConsole Applications Tab

The Applications tab provides access to the applications the user is licensed/configured to use. If a user does not have access to an application they believe they should have access to, they should contact the PMO for assistance.

3.5.   CamConsole Collaboration Center Tab

Some users will have access to collaboration utilities which permits them to invite other users in to a live session on the MS Project client. This utility is primarily reserved for the PMO. If you find you have need for the utility, please contact the PMO.

3.6.   CamConsole Communication Center Tab

The CamConsole includes the capability to send messages within the CamConsole system. These messages do NOT go outside the CamConsole environment. For the NC SBIP project, the CamConsole Communication

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Last Update: 1/11/2007 8:39 AM   6   Last printed 1/11/2007 8:39 AM
FINAL

Center will not be used as a replacement for the State email system. Therefore, all project-related communications should be made utilizing the State email system.

3.7. CamConsole Support Tab

The *Support Tab* is broken down into three sections: Technical Support, My Info, and Knowledgebase.

3.7.1. Technical Support Folder

If a user has a technical support issue, they are asked to fill out a request form. This will help the Administrators best support the requirements of the users and maintain an active log of the current requests in the system to determine if they are anomalies or trends. Users should primarily choose the Beacon PMO Administrators for support request action. Users can also track their open issues in the system, or request a functionality enhancement.
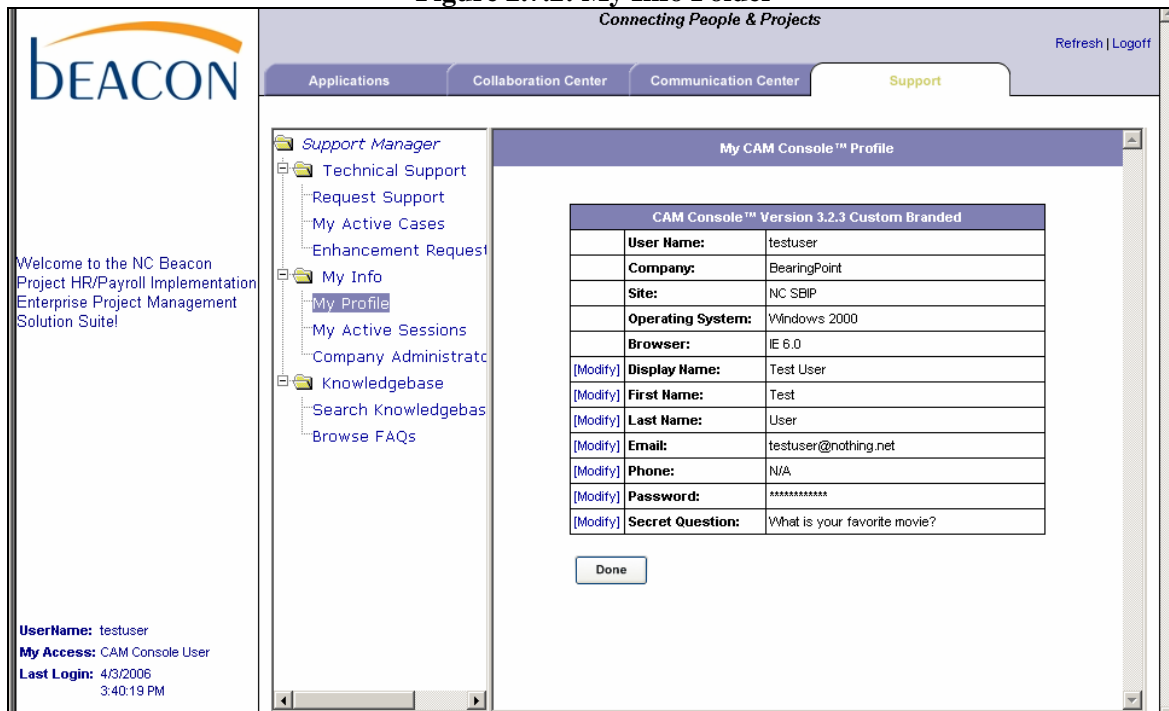
Figure 2.7.1: Technical Support Tab
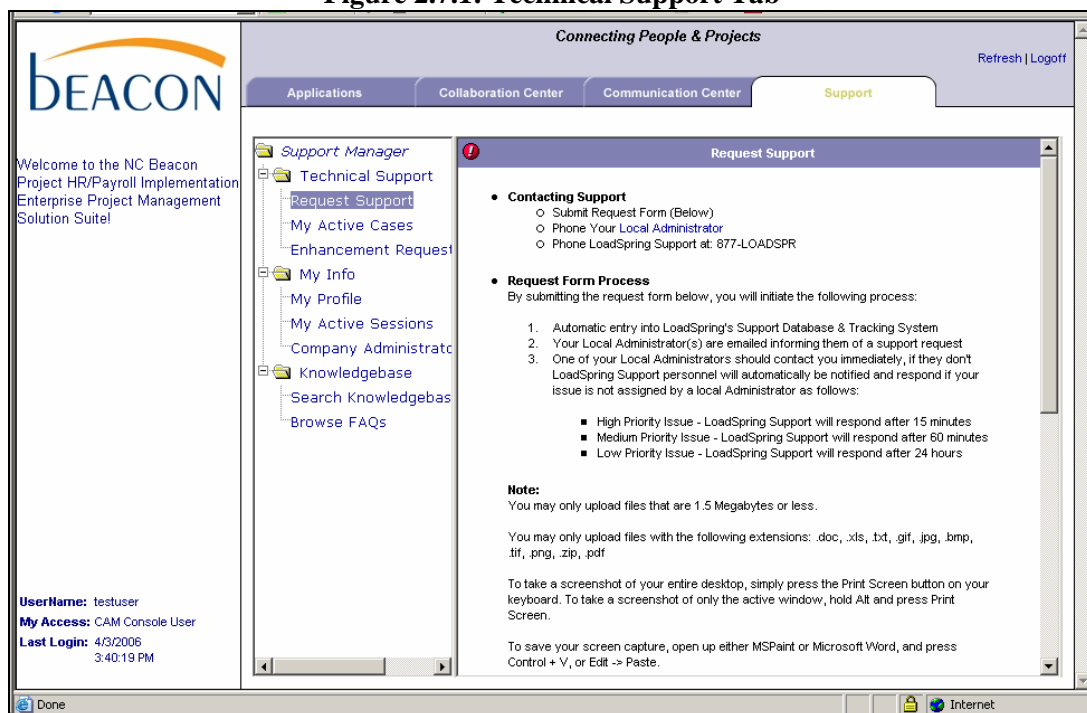
3.7.2. My Info Folder

Users can view their user profile information, view the sessions they currently have running (helpful if they are trying to log in but continue to receive a session error), and review the information for the Beacon Administrators.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   7   Last printed 1/11/2007 8:39 AM
FINAL

As part of the application preparation, all user accounts were fully set up. Each user will receive a password that they will need to keep until they are notified they can change it. All users will be required to modify their Secret Question and Answer as all were set up with a generic initial entry.

To modify the Secret Question and Answer, expand the *My Info* folder and click on *My Profile*. Select *Modify* next to Secret Question and select a new question (or keep the existing question) and enter the updated Answer information. Select *Update* to save.

Figure 2.7.2: My Info Folder

3.7.3. Knowledgebase Folder

Users are requested to first browse the FAQ section prior to submitting Support Requests. The FAQ section contains answers to some of the more frequent questions regarding the use of CamConsole. Users can access the FAQ by navigating to the *Knowledgebase* folder, and clicking on *Browse FAQs*.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   8   Last printed 1/11/2007 8:39 AM
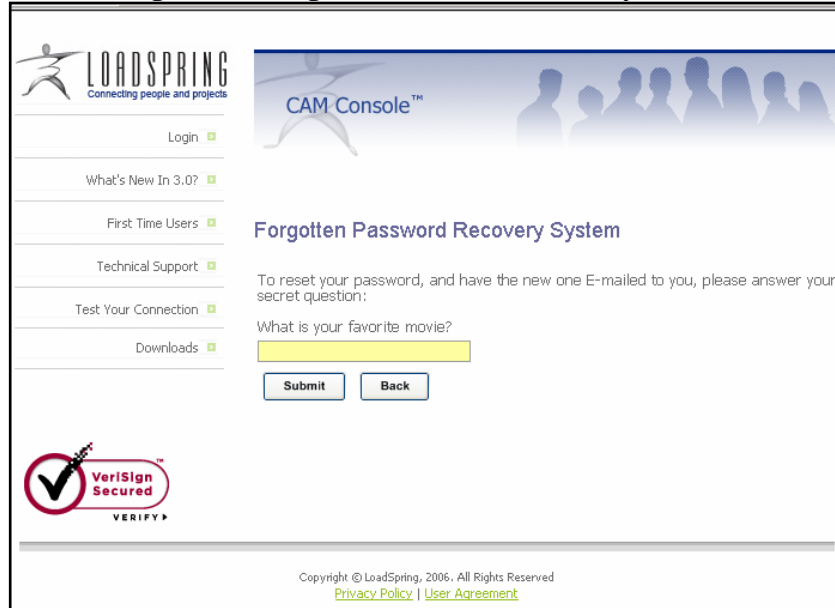**FINAL**

Figure 2.7.3: Knowledgebase Folder
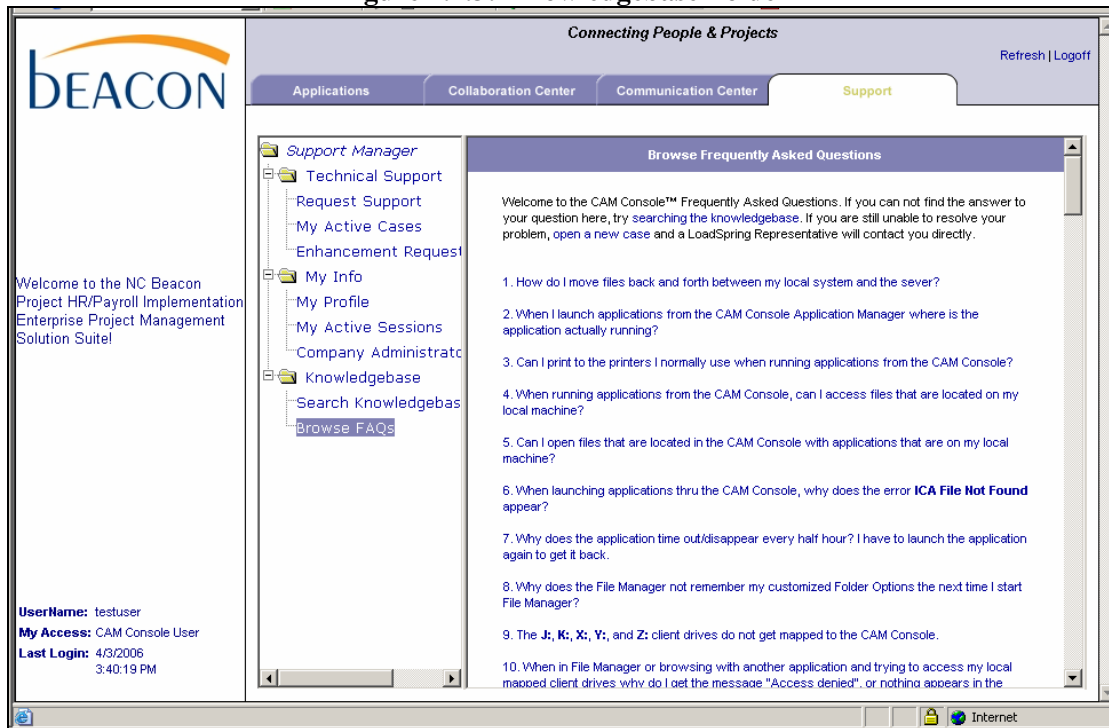
4. FORGOTTEN PASSWORD UTILITY

The CamConsole includes an integrated Password retrieval capability. If a user forgets their password, they should perform the following steps:

- At the CamConsole login page, click on "*Forgot Your Password?*"

- At the prompt, enter your user name (firstinitial_lastname; i.e.: jjernovics) and click *Submit*

- Provide the answer to your secret question and your password will be reset and emailed to you.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   9   Last printed 1/11/2007 8:39 AM
FINAL

Figure 3a: Forgotten Password Recovery Screen

Upon email receipt of the reset password, the next time you log in you will provide the password provided via the email and then you will be prompted to provide a new password for the system.

Figure 3b: Automatic Change Password Request Screen

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Last Update: 1/11/2007 8:39 AM   10   Last printed 1/11/2007 8:39 AM
FINAL

APPENDIX A: INITIAL LOGIN CHECKLIST

Use the following table as a checklist for logging in to the Beacon HR/Payroll Implementation Project EPM environment.

	1. Enter http://camconsole.myloadspring.com in Internet Explorer
	2. Save the page to your *Favorites* by selecting *Favorites, Add to Favorites*
	3. Enter your Login Name (firstinitial_lastname) and password (received from PMO)
	4. Navigate to **Support Tab**
	5. Expand the *My Info* folder
	6. Click on *My Profile*
	7. Click the *Modify* button next to **Secret Question**
	8. Select a **Secret Question** from the dropdown list
	9. Enter the answer to your secret question (case sensitive!)
	10. Select *Update* to save information
	11. Navigate to the **Applications Tab** to access Beacon HR/Payroll Implementation Project Microsoft EPM solution application.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   11   Last printed 1/11/2007 8:39 AM
FINAL

APPENDIX B: ADVANCED CAMCONSOLE CONFIGURATION FOR MS PROJECT PROFESSIONAL CLIENT USERS
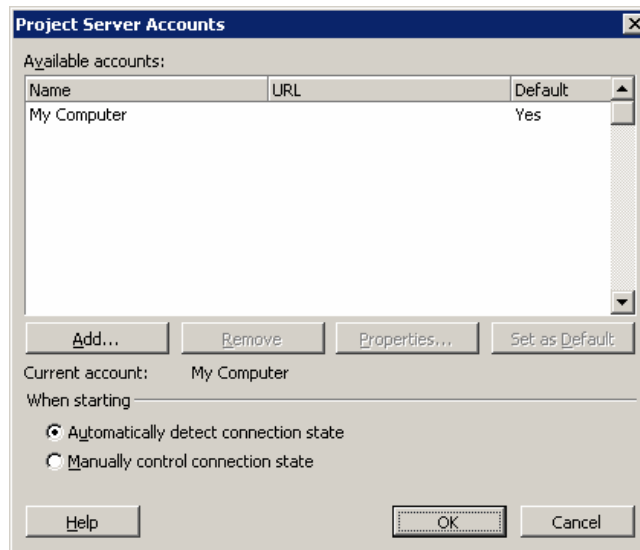
B.1. Project Server Account Creation

User profiles for accessing the Microsoft Project Professional 2003 component of the EPM solution have been specially administered to reduce the amount of effort required for end users to configure it themselves. The following steps have been taken to enable Windows Authenticated access to the EPM solution. Users should notify the PMO Administrators in the event they can no longer access the EPM solution via Project Professional 2003.

- Click on the icon for *Project2003* on the **Applications Tab**

- Establish a Project Server account for the user:

    o If a Project Server Account has not been configured for the user, the application will boot straight to MS Project (users with a Project Server account should see a window that asks them what they want to connect to).

B.1.1. To create an account:

- Click *Tools, Enterprise Options, Microsoft Office Project Server Accounts*

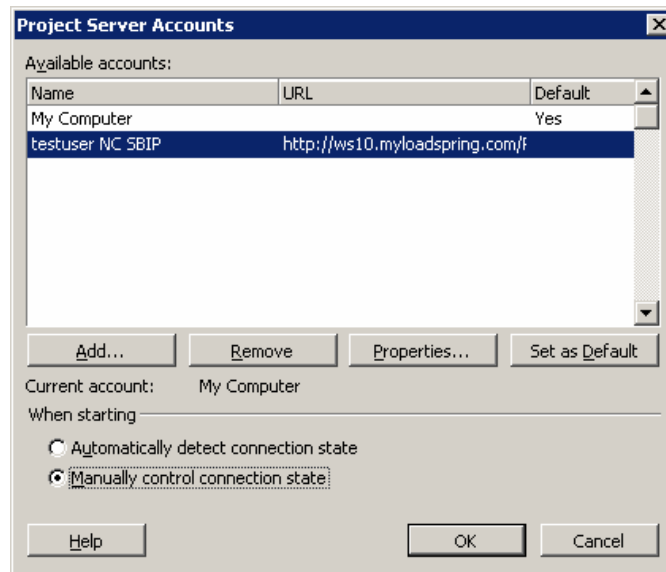- A single entry of "**My Computer**" should appear in the window

    NOTE: If another entry in addition to **My Computer** appears, simply select the Radio button next to "*Manually control connection state*". This will enable the prompt for the user to choose how to connect to Project Server.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   12   Last printed 1/11/2007 8:39 AM
FINAL

- Select the Radio button next to "*Manually control connection state*"

- Click the "*Add*" button

- Enter an account name (User Name and NC SBIP)

- Enter the Project Server URL (https://ws10.myloadspring.com/ProjectServer)
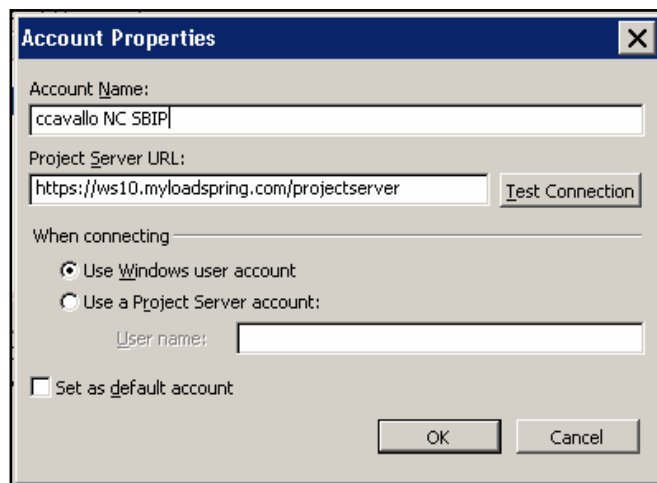
- Click *OK*

- You should now see two available accounts. Verify that "*Manually control connection state*" is selected and click *OK*

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   13   Last printed 1/11/2007 8:39 AM
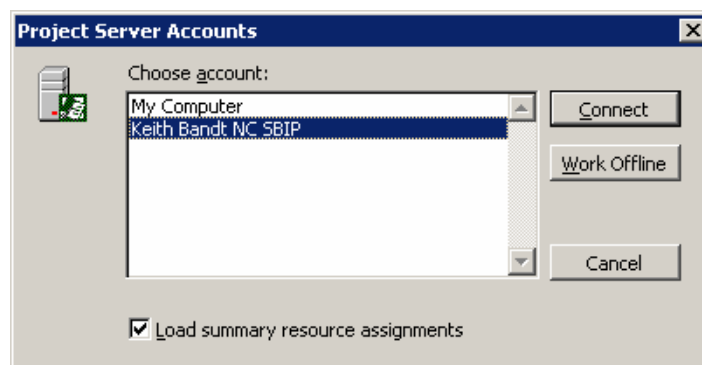
FINAL

- Fully exit out of MS Project.

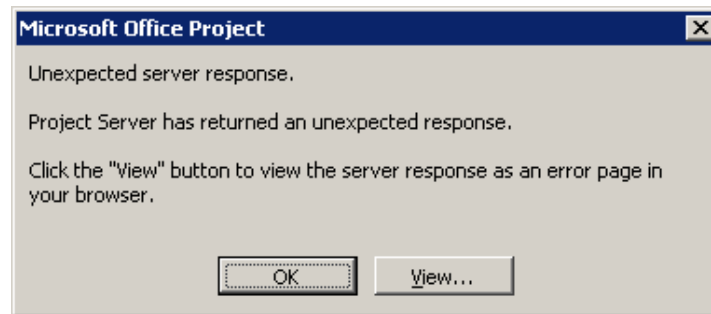B.1.2. **Enable Project Server Site Security**:

The next step is to configure the Project Server site as a Trusted Site (**NOTE**: these settings will apply to the LoadSpring server, **not** the User machine. It will *look* like it is on the User browser, but it is not).

- Click the Icon for *Project2003* on the **Application Tab**

- This time the user should be given a choice between *My Computer* and the *User Profile* created previously. Select the User profile and click **Connect**
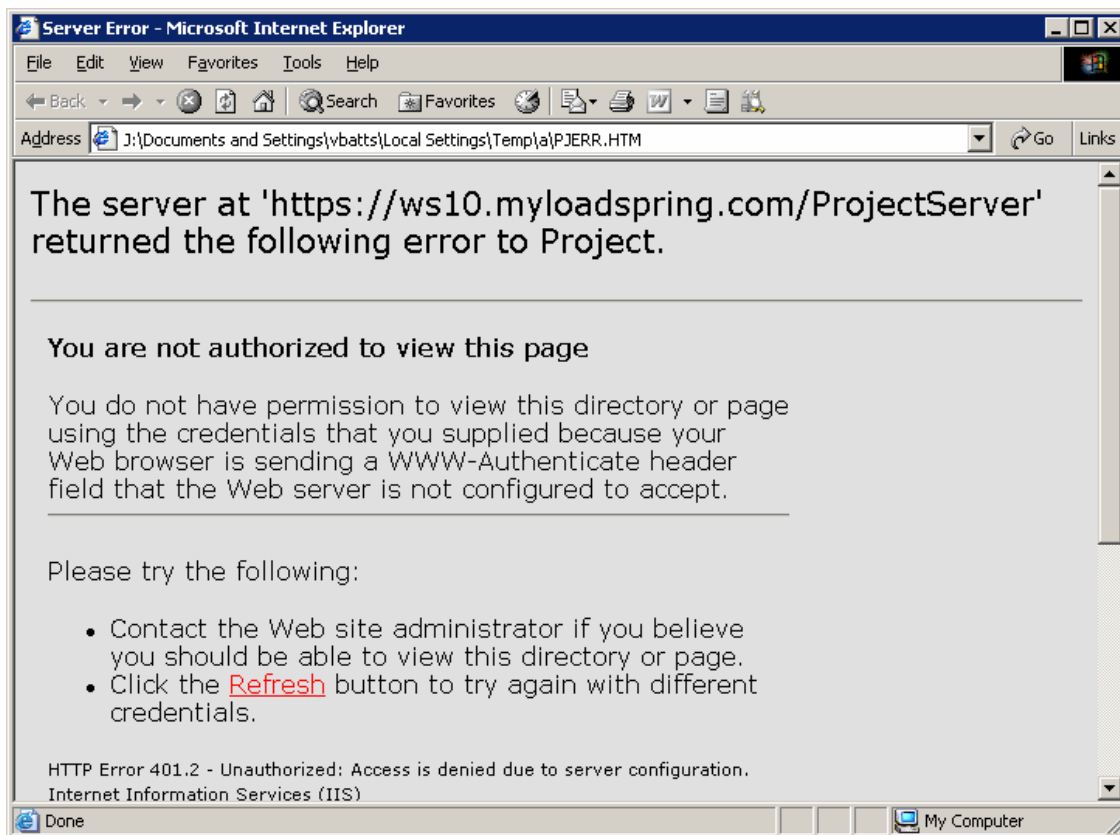

- The server will return an "Unexpected server response" message

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Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   14   Last printed 1/11/2007 8:39 AM
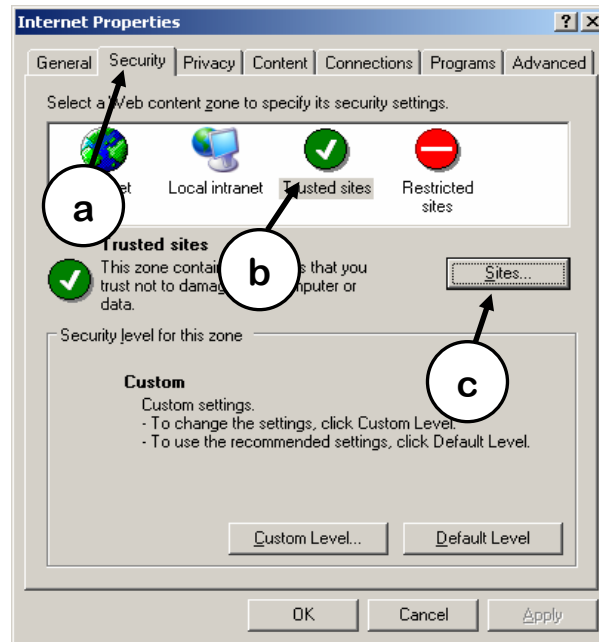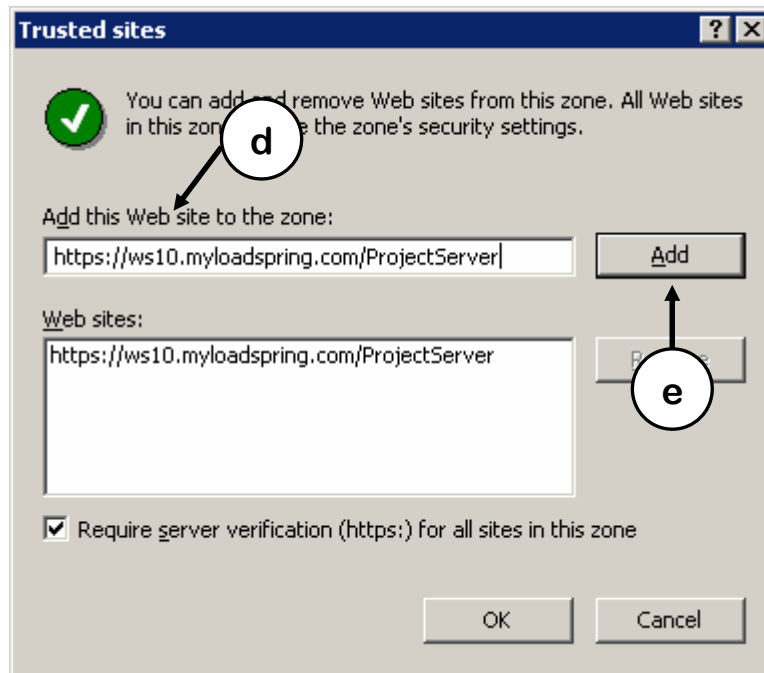**FINAL**

- Click on the *View…* button

- An Internet Explorer window should spawn that states there was an *HTTP 402.1 Error*

- On the **Error screen window**, select *Tools, Internet Options*

  - Click on the Security Tab (a)

  - Highlight Trusted Sites (b)

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   15   Last printed 1/11/2007 8:39 AM
FINAL

- Click **OK** twice to exit.

- Close the Error browser, the **MS Project Choose Account** box should pop up again. Select the User Profile and it should log the user in to the Project Server

- Test connection to the Project Server by selecting *File, Open*. The resulting window should be looking at the server instead of the user's "C" drive.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   17   Last printed 1/11/2007 8:39 AM
FINAL

APPENDIX C: COMMON ERRORS

When I launch Project2003 it takes me directly to MS Project and not Project Server.

C.1. Ensure that the option for "*Manually control connection state*" is selected per the instructions in section B.1.2.2. If a profile does not exist for connecting via Project Server, create the connection using the full instructions in sections B.1.2.2 and B.1.3.

When I try to connect to my Project Server account profile, I get an "Unexpected Server Response" error.

C.2. In this instance, the server has most likely "lost" it's status as a Trusted Site. Follow the instructions in section B.1.3.1 to add the Project Server site to the Trusted Sites in the LoadSpring referral page.

When I try to log in to LoadSpring, I get a warning message regarding having a pop-up blocker.

C.3. If you have a third-party pop-up blocker enabled, it is highly suggested you disable it prior to logging in to LoadSpring as it will possibly prevent the launching of applications from within the LoadSpring environment. If you are using the built-in Internet Explorer pop-up blocker, please disable it by selecting Tools/Pop up blocker/ Disable popup blocker within Internet Explorer or set it up to accept pop-ups for the following url: http://*.myloadspring.com.

Filename: C:\Documents and Settings\edward.brodsky\My Documents\PDF Deliverables\1.1 Project Prep\Final\Implementation\1.1.8_PMO_GU_LoadSpring_r1.0.doc

Last Update: 1/11/2007 8:39 AM   18   Last printed 1/11/2007 8:39 AM
FINAL